Approval Management

The Approval Management page allows supervisors to make an approval decision (approve, reroute, recall/return, not approve) on case or provider work that has been approved by a worker and forwarded to the supervisor. Supervisors can also reroute approvals for which their workers have been part of the approval chain.

Select the Approval tab > Approval Management hyperlink to open the Approval Management page or click the Actions [menu] > Management > Approvals management.
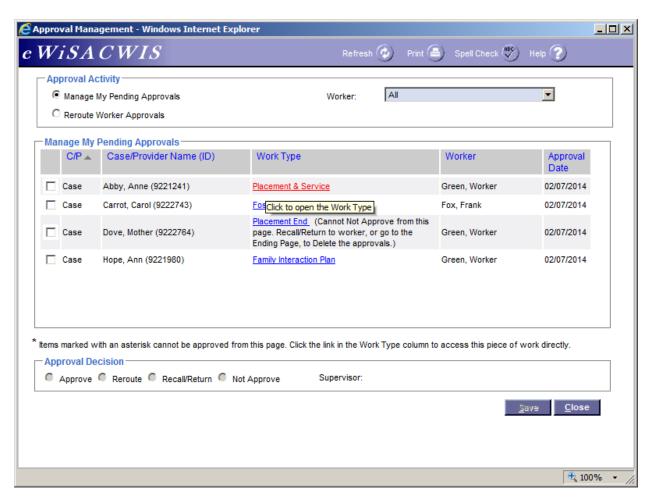
Manage My Pending Approvals

1. The Approval Management page defaults to the 'Manage My Pending Approvals' view. The Worker drop-down list defaults to 'All.' You can toggle between 'Manage My Pending Approvals' and 'Reroute Worker Approvals' by selecting the appropriate radio button. You may also choose to view 'All' pending approvals for the supervisor's workers or approvals specific to an assigned worker by selecting the worker from the 'Worker' drop-down in the Approval Activity group box. There is also an auto sort feature with each column in the Manage My Pending Approvals group box. The triangle next to the C/P is currently sorting by case first and provider second. By clicking on the C/P column, the system will sort providers first and cases second. The auto sort feature works the same way for each of the columns.

2. You can view specific pieces of work by selecting the 'Work Type' hyperlink corresponding with the Case/Provider Name. You can also individually approve that specific piece of work while viewing it through the normal 'Approval Process' (see 'Approval' User Guide).
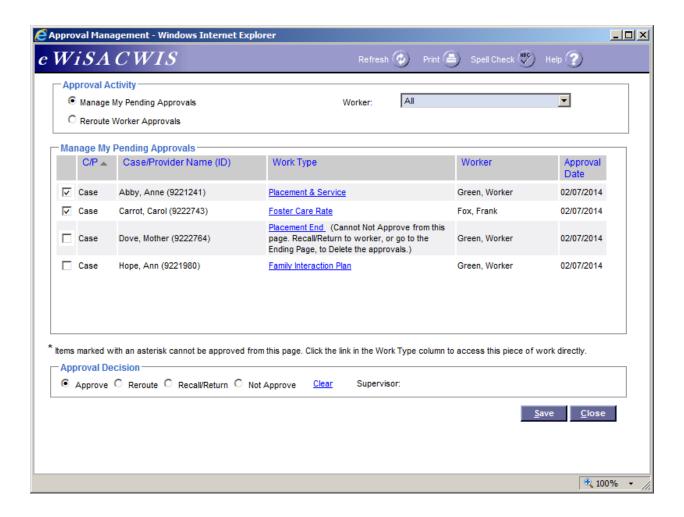
   Note: Items marked with an (*) asterisk can only be approved by clicking on the Work Type hyperlink and approving the work from within the specific piece of work.

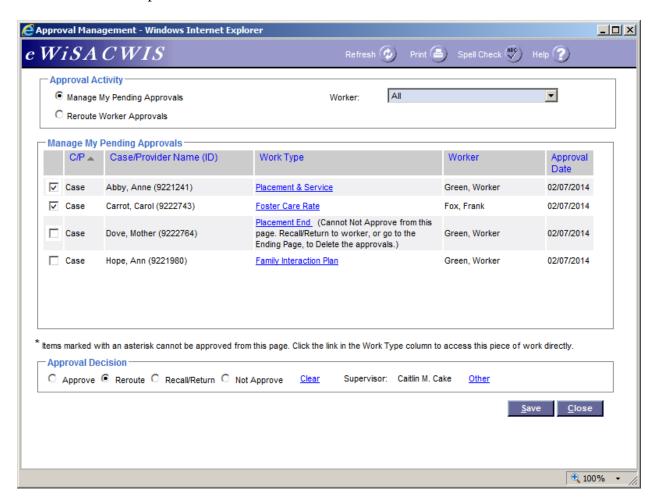3. Multiple pieces of work can be addressed at the same time by selecting the checking box to

the left of each piece of work. When this is done, the Approval Decision group box will become enabled. You will be able to Approve, Reroute, Recall/Return, and Not Approve multiple pieces of work at the same time. The Clear hyperlink will clear out the current Approval Decision selection.

4. If you choose to Reroute the selected pieces of work, the Other hyperlink can be used to search out the supervisor in which the work will be rerouted to.
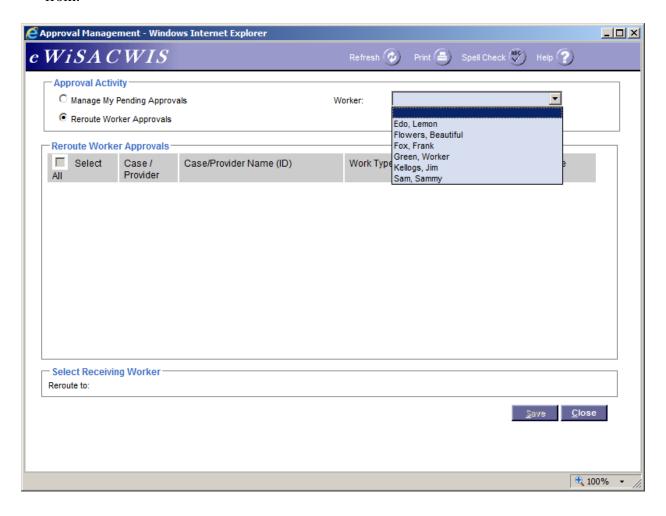

5. Select Save and Close.

Note: If you try to approve a case/perm plan without all required linked documents (RCSE, FIP, SAAP, etc.) you will receive an error and be unable to approve the case/perm plan until the other documents are approved. All parts of a case/perm plan can be approved at the same time.
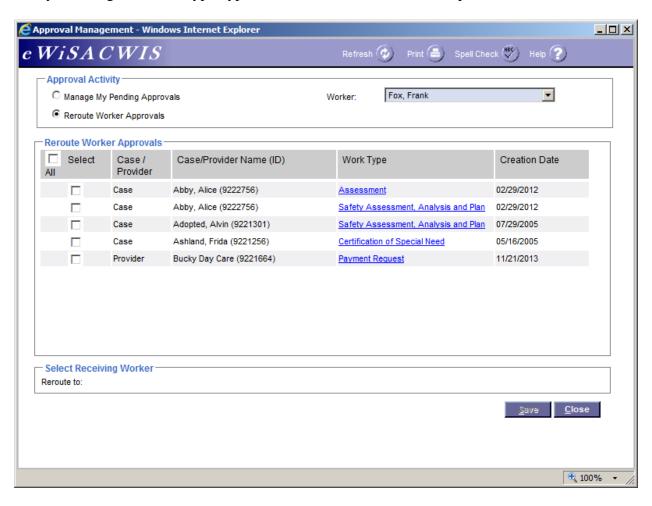
Reroute Worker Approvals

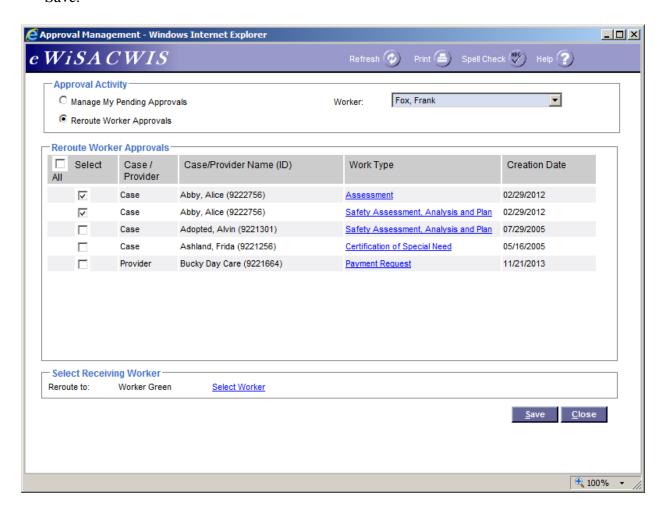A Supervisor can reroute pending approvals for an existing worker to another worker assigned to the same supervisor.

1. On the Approval Management page, select the Reroute Worker Approvals radio button.

2. Select the worker from Worker drop-down for whom you want to reassign pending approvals from.

3. Once the worker has been selected, all pending approvals for that worker will display in the Reroute Worker Approvals group box.

4. You can click the Select All checkbox or select individual pieces of work to be rerouted in the Reroute Worker Approvals group box. You can also look at the individual pieces of work by selecting the Work Type hyperlink next to the associated case/provider.

5. Once you select the pieces of work to be rerouted, a Select Worker hyperlink will appear at the bottom of the page. Search out the worker for whom the work should be rerouted. Click Save.

6. A pop-up message will appear with the following message: "This will reroute the approval history for the selected approvals to the identified worker. Do you wish to continue?" Click Yes. You will return to the Approvals Management page.